

LOOMIS, SAYLES & COMPANY

# Undergraduate Women's Investment Network

News, program updates, student spotlights, mentorship program, & much more!

## LETTER FROM THE FOUNDER

**Shannon O'Mara**, CFA, Founder of UWIN  
Head of Credit Research

Following the celebration of 10 years of the UWIN program last year, we are excited to recognize a significant milestone for Loomis Sayles in 2026 as we celebrate the firm's founding 100 years ago! The two key tenets that have been notably woven through the last century of our firm are 1) helping our clients achieve their goals and 2) utilizing insightful research to underpin our investing process. These two long lasting drivers of our success are reflected in our firm's mission and vision and notably our values which are defined by our "IDEALS": Inclusive & diverse, Dedicated to teamwork, Excellent, Accountable, Leaders and Solutions-oriented.

The UWIN program is a product of the foundational principles that our firm's founders designed 100 years ago, as well as the values reflected in our IDEALS. As we've prepared for this milestone anniversary, we have been introspective about the key tenets of the UWIN program. We have reaffirmed our commitment to inspiring, developing and recruiting the next generation of talent in the industry.

In fact, we now count 18 UWIN alumni among our colleagues on investment teams and in central groups like research, trading, sustainability, marketing and client service. I'm pleased to share that our Associate Development Program will welcome three more UWIN alumni to the firm in July 2026 when the fourth cohort launches.

A key part of the UWIN mission is to inspire. I invite you to read about the inspiring stories and advice from current participants, alumni, mentors and managers in this newsletter. I'm proud to share that 159 current Loomis Sayles employees have mentored students in this program. Including others who've volunteered their time for workshop sessions and recruiting, nearly 20% of Loomis Sayles employees have contributed to making the UWIN program a success.

We've partnered with nearly 350 students from 35 colleges and universities in the last decade, including six schools new to the program this year: Assumption University, Colby College, Cornell University, Massachusetts Institute of Technology, University of South Carolina and Wake Forest. UWIN participants are discovering their career interests, unlocking avenues of opportunities, developing new skills, and expanding their networks with the guidance of their mentors and through the professional and technical skills workshops offered through the program. Many participants have landed internships in investment management and navigated successful careers into the financial services industry. I invite you to learn about these success stories in the Good News section of this newsletter.

I'll close with a message I recently received from a UWIN participant. This captures the sentiment of so many students who fully engage in the program and leverage all its resources.

"UWIN is nothing short of career-altering on a life-time scale. My confidence in networking and drive to pursue my excitement for this industry have been wildly enriched just in the last few months. Thank you so much for all the work you and your colleagues put into this program; every bit of it is felt, and I'm incredibly grateful for this opportunity!"  
UWIN Mentee 2025-26

If you'd like to connect to learn more, get involved or share some inspiration, I welcome a conversation. Cheers to another 10 years of inspiring, developing and recruiting the next generation of talent!



**Wishing you a prosperous 2026,**

*Shannon*

# UWIN HITS A MILESTONE!

## CELEBRATING 10 YEARS OF INSPIRATION & DEVELOPMENT

The UWIN program was created in 2015 with our first cohort of 18 pioneering students from Bentley University who trusted our vision in our pilot program. After widespread positive feedback from students, we expanded to **all schools in the United States!**

# 11

YEARS OF HELPING UNDERGRADUATES SUCCEED

# 340+

INDIVIDUALS HAVE PARTICIPATED IN UWIN

# 35

COLLEGE & UNIVERSITY PARTNERS

# 18

HIRED FULL-TIME AT LOOMIS SAYLES



INSPIRE. DEVELOP. **RECRUIT.**

## 2026 RECRUITING DETAILS

This February, we embark on recruiting for our 12th year of the program! Help us spread the word for our information session on:

**17 February 2026 at 4:00pm.**

**[Click here to register.](#)**

Applications are due on 5 March 2026 via [the Loomis Sayles careers website.](#)

*We strongly encourage all people who are committed to advancing the UWIN mission to apply, regardless of gender or gender identity.*

# Meet the Class of 2025-2026

UNDERGRADUATE WOMEN'S INVESTMENT NETWORK



# WHAT'S NEW?

## HAPPY BIRTHDAY!

### LOOMIS SAYLES CELEBRATES A MILESTONE IN 2026: 100 YEARS!

Over the past year, we have archived and reflected on our firm's history, and one theme emerged with remarkable clarity. When our founders opened our doors in 1926, they established two core principles that continue to define who we are.

**First**, they believed that every effort of the firm should be guided by a single purpose: helping our clients achieve their goals. They understood that lasting success is built on true partnership—earned through trust, credibility and our responsibility as careful stewards of capital.

**Second**, they believed that strong performance is never accidental. It is the result of humility, discipline, rigor and a deep understanding of every security in which we invest. Even at a time when the investment advisory industry was still emerging, our founders recognized a timeless truth: to outperform the market, you must think differently from the market. And to think differently, you must know more through thorough, independent and insightful research.

Throughout 2026, we will mark this centennial together and with our clients, using this moment to elevate our story and strengthen our presence around the world. We encourage you to go to our refreshed website, [www.loomissayles.com](http://www.loomissayles.com), and visit the Centennial Hub, [www.centennial.loomissayles.com](http://www.centennial.loomissayles.com), to hear more about our story, reinforce our credibility and showcase what sets us apart. This centennial is not only a celebration of the past but also a recommitment to the future—to our clients, to our colleagues, and to our long-standing tradition of going above and beyond in everything we do.



# Student Spotlight

I spent my fall 2025 semester with the Credit Research Team, working under Head of Credit Research Shannon O'Mara and Senior Credit Research Associate Alex Greenberg. During this rotation, I led the development of a credit research report on a building products issuer following the announcement of an acquisition. My work included forming a credit opinion, developing a relative value recommendation, evaluating end markets and business segments, identifying key competitors, and supporting my findings with a three-statement financial model and valuation analyses. Toward the end of my rotation, I summarized my conclusions in a capstone presentation delivered to professionals in the Credit Research department.

My goals for the UWIN program were to gain a deeper understanding of the asset management industry, strengthen my technical skills and apply valuation frameworks in a real-world setting. Throughout the rotation, I learned how iterative the credit research process is, drawing on numerous data points and refining my recommendation over time as new information became available. I particularly enjoyed experiencing how dynamic the market can be, including incorporating recently released earnings into our analysis and seeing how quickly market conditions and relative value assessments can evolve. A highlight of my experience was my relationship with her mentor, Matthew Kelly, who played a key role in helping me think through my relative value recommendation and develop intuition around credit positioning.

I am currently a junior at the Massachusetts Institute of Technology studying Computation and Cognition with a minor in Finance. I am a varsity athlete on the lightweight women's crew team and am involved on campus with Scholars of Finance, Women Business Leaders, and Alpha Phi. In my free time, I enjoy skiing out west, distance running and baking, where I have tested over 20 different chocolate chip cookie recipes.



## MELISANDE NABAGE



**UWIN PROGRAM:** INTERNSHIP & MENTORSHIP 2025-2026

**SCHOOL:** MASSACHUSETTS INSTITUTE OF TECHNOLOGY

**CONCENTRATION:** COMPUTATION AND COGNITION

**MENTOR:** MATTHEW KELLY, CREDIT STRATEGIST

**INTERNSHIP ROTATION #1:** CREDIT RESEARCH

**INTERNSHIP ROTATION #2:** RELATIVE RETURN

*"Beyond technical guidance, my mentor offered thoughtful advice on how to set myself up for long-term career success and facilitated networking opportunities with professionals across other teams, giving me valuable insight into the paths that led colleagues to Loomis."*

# Manager Spotlight

I just concluded my second year as a manager for UWIN interns. In addition to serving as a manager, I have served as a mentor for two undergraduate students. My involvement in the UWIN program has been exceptionally rewarding. It has been a pleasure to work with these students and play a small role in helping them reach their professional goals. I continue to be amazed by the level of talent that the UWIN program attracts.

To ensure a meaningful learning experience, I designed the internship around a semester-long project that culminated in a comprehensive credit report and formal presentation. Throughout the program, the interns gained valuable experience conducting industry research, analyzing financial statements, and building advanced financial models. At the end of the semester, each student presented their credit rating and relative value recommendations to a group of senior analysts and portfolio managers. Not only did this project provide an opportunity to learn the fundamentals of credit research, but it also encouraged the students to further develop various key skills including critical thinking, problem solving, decision making and public speaking.

I encourage other colleagues to consider serving as a manager for UWIN interns. It is a great opportunity to mentor participants and contribute to their career development goals.



## ALEX GREENBERG



**TITLE:** SENIOR CREDIT RESEARCH ANALYST

**DEPARTMENT:** CREDIT RESEARCH

# Mentor Spotlight

## MATT KELLY, CFA

### CREDIT STRATEGIST

Forging a career path as a student, especially when opportunities abound, can be overwhelming. Mentors provide guidance and support and serve as networking conduits for mentees, thereby alleviating some of the stressors associated with starting a new career. The caliber of the 2025–26 UWIN mentees and interns is top-notch, and I have been impressed by my mentee’s preparedness, motivation and financial acumen. I am amazed at the breadth of conversations I have with my mentee, Melisande, which range from resume construction and presentation readiness to various approaches to fixed-income relative value. Although my official role as a mentor spans the school year, I plan to continue working with my mentee during these early days of her career. I take great pride in the opportunity to participate in a program that is supporting gender diversity within the investment management industry.



## CLAUDIA STEDT

### RESEARCH ASSOCIATE

I’m grateful to be part of the UWIN program, and the team did a wonderful job pairing me with my mentee, Rachel. Our shared interest in consumer companies has led to energizing, thought-provoking conversations. Rachel asks insightful questions that often broaden my own perspective—a powerful reminder of the value of different perspectives in the investment management industry. Having recently gone through the post-grad job search myself, I can relate to what she’s navigating and offer timely advice as she considers her next steps. I’m confident our connection will extend long after the program formally concludes.



## JEFF SCHWARTZ, CFA

### PORTFOLIO MANAGER

I have been fortunate and thankful for the past few years to have had the opportunity to mentor students in the UWIN program, supporting them as they navigate both academic pathways and explore careers in asset management. I am privileged to share my own professional experiences and to help mentees clarify and to set goals, kickstart their own development, raise confidence to expand one’s network, act as a sounding board and introduce doors to new opportunities. I typically can write a chapter of a book each time we meet as I always discover new inspiration and perspectives from our interactions. It is also so rewarding to see the mentee’s growth. My experience has underscored the power of accessible mentorship and UWIN’s impact in fostering confidence, community and inclusion within the investment field. I am proud to be part of the Loomis Sayles organization that offers this supportive opportunity to next generation talent.



# FOLLOW US ON INSTAGRAM...

## @startatloomissayles

Follow us on Instagram for program highlights, industry advice, behind the scenes, and participant spotlights from both of our undergraduate programs.



startatloomissayles



startatloomissayles



# Post # Followers # Following

**UWIN and USID at Loomis Sayles**

Finance

Internships, mentorship & investment career kickstarters from @loomissayles. Home to UWIN+USID. Learn more about how you can #startatloomissayles:

[linkin.bio/startatloomissayles](https://linkin.bio/startatloomissayles)



UWIN



USID

# Alumni Spotlight

Throughout much of my time in college, I was unsure about my career path. With so many options and limited understanding of the finance industry, expanding my network and applying for jobs was confusing and overwhelming. Hearing stories about how competitive the market was made me feel like I couldn't keep up. I wasn't as brave as my peers who confidently formed new connections with strangers on LinkedIn. I didn't always have the right answers or the best grades in class. I believed that I had fallen behind and wasn't equipped to pursue a career in finance. When I first learned about UWIN, I heard other mentees talk about how their experiences guided them and it sounded exactly like what I was looking for. Many of these accomplished women talked about how they once felt the way I did—and how the UWIN program provided them with the opportunities that they needed to feel more confident, knowledgeable and connected.

My mentor, Kenny Wallace, guided me through the UWIN program with attentiveness and purpose. Kenny took time to understand where I stood with my career development, as well as what my goals for the program were. Together, we actively planned out innovative strategies to help me strengthen my resume, navigate my job search, and network with the community. He gave me advice on ways to stay engaged with the business market through podcasts, online articles, financial news, and critical thinking exercises. We held market debriefs and Q&A sessions to discuss current market events and reinforce my technical knowledge. During our monthly meetings, Kenny and I also did resume reviews and mock interviews to help me prepare for my active job applications. In our mock interviews, I didn't always have the right answers to Kenny's questions; however, feeling embarrassed or insecure, I learned how to face what I didn't understand. Not knowing something is simply a starting point, and I started to reframe setbacks as an expected part of the learning process, rather than evidence of my self-worth and capabilities.

UWIN offers personalized experiences for every mentee and their needs but goes above and beyond by providing additional resources for anyone that wants to make the most out of their experience in the program. My conversations and experiences at UWIN gave me a common ground that I could share with other mentees, even if we had different backgrounds and interests. I also had the opportunity to speak with many Loomis Sayles employees during the monthly conferences. I had walked into UWIN only expecting to meet Kenny as my mentor but finished the program diving headfirst into my new career and connections.

Everyone at UWIN, mentors and mentees alike, are mentors to each other; building community and continually learning from each other in the pursuit of growth has been one of the most valuable traits that I have developed through UWIN. It's not always about having the right answers or the best grades in class, but about the perseverance, ambition and curiosity behind the how's, why's and what's in life. These lessons transformed my fears into growth, helping me take all my experiences and turn them into learning opportunities.

INSPIRE.  
DEVELOP.  
RECRUIT.



## ELINA CHEN

**COMPANY:** GORDON BROTHERS

**UWIN PROGRAM:** 2024-2025

**TITLE:** GLOBAL VALUATIONS FINANCIAL ANALYST

**SCHOOL:** MASSACHUSETTS INSTITUTE OF TECHNOLOGY

"I am forever grateful for the UWIN community, as well as all the mentors that helped me successfully navigate my career and secure a position in the finance industry."

# Alumni Spotlight

I recently shared my story on a client's podcast, reflecting on how my career truly began with the launch of UWIN in 2015. Shannon O'Mara welcomed me to the Loomis team as one of the first five interns—look at how far the program has come! The internship was a turning point, providing hands-on learning, mentorship and exposure to the real-world dynamics of investment management.

Every skill I learned and honed at Loomis Sayles snowballed into a career in credit research and, eventually, Private Banking. From day one, I was immersed in practical experience. Jason Yum from the Special Situations & Distressed/Converts team had me print out Apple's 10-K, and that kicked off my journey. I put on my investor hat, built my first financial model and wrote my first research report. The next rotation in credit research deepened my analytical skills and prepared me for roles with the Relative Return Team and, later, my full-time position with Loomis Sayles after graduation and then running down to the trading floor for the morning meeting.

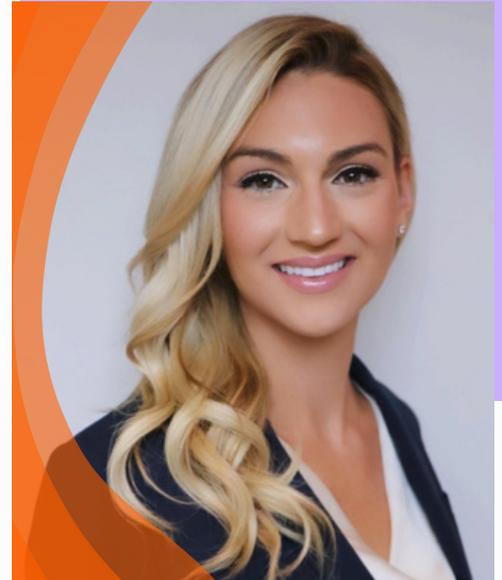
Each role with the research team added to my toolkit: starting with investment grade corporate credit analysis, then moving into the broadly syndicated loans and high yield markets. I gained valuable exposure to distressed investing, analyzing the restructuring of California utilities during the 2018 wildfires. The internship fostered my professional development, confidence and technical skills, including Bloomberg proficiency, and inspired me to pursue the CFA designation. Shannon O'Mara, Joanne McIntosh, Matt Kelly and Carol Embree were incredible mentors who shaped my growth, and I'm grateful to the entire research and fixed income trading teams for their support and guidance.

UWIN provided the building blocks for my career, offering networking opportunities, skill-building and a strong foundation that enabled me to underwrite private credit at Liberty Mutual Investments and now guide ultra-high net worth clients through their investments. The confidence I gained came from learning alongside some of the brightest leaders in Boston and the broader fixed income community.

Own the experience

Value Feedback

Brand Building



## EMILY RICHARD, CFA

**COMPANY:** JP MORGAN PRIVATE BANK

**TITLE:** VICE PRESIDENT, INVESTMENT SPECIALIST

**UWIN PROGRAM:** 2015–2016

**SCHOOL:** BENTLEY UNIVERSITY, 2017

"Hard work is essential, but what truly made a difference was the mentorship, exposure and opportunities I received at UWIN and Loomis."

# Inside a UWIN Mentorship

## As a mentee/mentor, why did you decide to be a part of the program?

**Bassel:** Early in my career, I benefited from outstanding mentors who guided me through pivotal moments. Their support helped me navigate uncertainties about my career direction and encouraged me to embrace new opportunities. Now I find fulfillment in sharing my experiences and helping the next generation of professionals build their careers, whether it's through resume building, thank you emails or networking advice.

**Natalie:** The first time I heard about the UWIN program was from my college roommate who told me about her sister's participation as a former mentee where she had a great experience with the program. UWIN seemed to be exactly what I was looking for—professional and personal development and connecting tools I've gained in the classroom with potential for my career. I was especially excited about the opportunity to participate in industry workshops where I could apply my education to real-world scenarios and receive direct feedback from professionals. UWIN creates pathways to experiment with different areas in the industry, build upon the topics I am learning at my university and get a head start on building connections.

## How do you personally contribute to this mentee/mentor relationship?

**Bassel:** In my role as a mentor, I openly share my professional journey, including the setbacks and mistakes I've encountered along the way. I believe these honest conversations help mentees understand that growth often comes from moments of challenge and learning, not just from successes. Networking is one of the best ways to create opportunities in your career. It can introduce you to new people, ideas and possibilities, but consistent effort, curiosity and communication skills are what truly help you succeed once you're in a role. Building meaningful relationships and demonstrating your commitment to learning will set you apart. My advice is simple: be curious about others, ask questions and don't hesitate to reach out, even if it feels uncomfortable. Every time you challenge yourself to try something new, you're paving the way for personal and professional growth.

**Natalie:** During the week, I read through the Wall Street Journal so I am prepared with questions about current events and how they are affecting markets, and I also offer my own analysis of market trends. Staying engaged within the industry helps expand my knowledge outside the classroom, enabling me to fill in those gaps between my coursework. By asking thoughtful questions and engaging in market research, it challenges both Bassel and me to think critically throughout our conversations.



**MENTOR:** BASSEL AGHA  
**ROLE:** SENIOR FIXED INCOME TRADER



**MENTEE:** NATALIE BROJEK  
**SCHOOL:** ASSUMPTION UNIVERSITY  
**UWIN PROGRAM:** MENTORSHIP 2025-26

# Inside a UWIN Mentorship

## As a mentor/mentee, what do you enjoy most about this program?

**Bassel:** I enjoy the opportunity to meet motivated young professionals who are eager to advance their careers. Natalie demonstrates initiative, positivity and a willingness to learn—qualities that I believe are essential for professional growth and closely align with the program’s goals. Natalie’s energy, enthusiasm, and appreciation for the time and effort invested make her an excellent example of what the program seeks to achieve. Mentoring Natalie has not only given me the chance to share my experiences but has also inspired me to continue learning and growing in my own career.

**Natalie:** The networking opportunities this program provides are truly outstanding. I’ve been introduced to sell-side dealers and professionals across various areas at Loomis Sayles, including investment, trading and research. Over the last few months, the network I’ve built is something I never imagined possible before joining UWIN. I’ve had the opportunity to visit the office several times and witness firsthand how the concepts I’m learning are applied in real-world scenarios. I’ve grown more confident in my communication skills and have developed a deeper understanding of the industry. In a recent conversation, Bassel walked me through implications of recent interest rate cuts on the fixed income markets. I look forward to conversations with Bassel which deepen my understanding of practical and technical knowledge. His support has been instrumental in my development, and I’m grateful for the continuous encouragement to ask questions and expand my perspective.

## What are some of the challenges within the program and how do you overcome them?

**Bassel:** A major challenge is finding time for meetings and dedicating consistent effort each week. As busy adults, balancing professional responsibilities and personal commitments—like my work and my kids’ activities—can make it difficult to prioritize mentoring. Natalie and I schedule our meetings in advance and dedicate one hour each week to focused conversation. By mapping out our meeting times and using that hour efficiently, we make sure our sessions are productive. We end each call by clarifying what we hope to achieve next, and I spend time during the week preparing to meet those goals. Having a set schedule, clear plan and open lines of communication are key to overcoming challenges and making our mentoring relationship successful.

**Natalie:** Throughout the year, it was difficult to balance academics, athletic commitments, work and the mentorship program, therefore time management was crucial. By planning out my weekly schedule, it was easier to find time to meet with Bassel. Overall, by staying disciplined, curious, and committed to following my schedule and agenda, I found that balancing my different commitments became very manageable and helped me further my development in the program.

# Inside a UWIN Mentorship

## What have you learned from your mentor/mentee?

**Bassel:** Working with Natalie has taught me to never underestimate the impact of genuine passion and curiosity. Her eagerness to learn is evident in every conversation—we can always dive deeper into topics, and she rises to the challenge even with her busy schedule. Natalie’s questioning not only deepens her own understanding, but it also encourages me to stay sharp and thoughtful in my explanations. Her approach reminds me that learning is a two-way street and that the best mentoring relationships challenge both participants to grow.

**Natalie:** One of the most valuable lessons I've learned from Bassel is the importance of challenging the limits of my comfort zone. For example, I reached out to a senior salesperson at Morgan Stanley, and even though I was originally nervous about initiating the connection, the experience turned out to be incredibly rewarding. I gained insights, and it helped me build the confidence to network more proactively. Bassel reminds me to recognize my strengths and weaknesses and to continuously refine my skills. He encourages me to embrace discomfort until it feels natural. His guidance has taught me that while I can't control the people around me, I can choose how I approach situations, adjust my mindset, and collaborate effectively with others. This shift in perspective has made me more resilient and adaptable, especially when interacting with experienced professionals. I am learning to view unfamiliar or challenging situations as opportunities for growth.

## What advice would you provide to future UWIN participants?

**Bassel:** To get the most out of your UWIN experience, approach every opportunity with an eagerness to learn and a willingness to ask questions—no matter how small they may seem. Being curious means exploring topics beyond your assigned tasks and actively seeking out new learning opportunities within the program. Make it a habit to come prepared to each meeting by reviewing notes or setting goals for discussion, which helps you maximize your time together. Setting regular meeting times and communicating expectations up front ensures that both mentor and mentee stay on track and make the most of your sessions.

**Natalie:** Showing initiative will get you far, and the more effort you put into this program, the more you'll gain from it. Staying eager to learn is demonstrated by asking thoughtful questions, participating in workshops, and keeping up with current events in the field. When you ask questions, you not only get answers, but you also form valuable connections and show your drive to grow. I constantly remind myself that the opportunity for growth is in my hands. Embrace every experience and don't hesitate to step outside your comfort zone. UWIN is designed for your personal and professional development, so shape the program to best fit your goals and aspirations.

# GOOD NEWS!

## A SPOT LIGHT ON ADVANCEMENT



### Good news from the 2025-2026 UWIN Program

- **Olivia Alper**, UMass Amherst: I was accepted into the Girls Who Invest Intensive Program and named Co-President of Smart Woman Securities at UMass Amherst.
- **Natalie Brojek**, Assumption University: I was accepted into the Loomis Sayles Undergraduate Summer Internship Program (USID) for summer 2026.
- **Stella Case**, Bentley University: I have accepted an offer to join Fidelity Investments as a 2027 Summer Equity Research Intern! I'm very excited for this opportunity, and am grateful for my mentors at Loomis who have helped me along the way.
- **Anna Deng**, Babson College: I was accepted into the Girls Who Invest Intensive Program and began my term as co-president of the Babson Finance Association.
- **Diza Girhotra**, UMass Amherst: I accepted a summer internship in Equity Research at MFS Investment Management. I was elected Technical Prep Chair of UMass Amherst Chapter of Smart Woman Securities. I was selected to join the Operations & Planning Committee for the Annual Women of Isenberg Conference at UMass.
- **Emily Hohmann**, Amherst College: I accepted an offer to join the Loomis Sayles Associate Development Program for post-grad and I am thrilled!
- **Paula Michel**, UMass Amherst: I accepted an offer to join Goldman Sachs as an investment banking analyst for Summer 2027.
- **Jenna London**, Colby College: I've accepted a full-time position as a Private Investments Analyst at Manulife John Hancock after graduation. I really appreciate the guidance and exposure UWIN has provided throughout the program.
- **Heather Lui**, Babson College: I'd like to share is that I've been accepted as a Girls Who Invest Intensive Program Scholar and have taken a position as an AI Innovation Fellow at Babson College.
- **Morgan McGahan**, Babson College: I have accepted an Investment Management Sales Internship offer for this summer at John Hancock in Boston.
- **Meghan Mylod**, Wake Forest: I have accepted an offer to join Parametric as an Investment Operations Intern in their Boston office this coming summer. I am really looking forward to the experience and am eager to get started!
- **Rhea Oswal**, Bentley University: I recently started working as a Data Researcher at Pryzm, a defense tech startup based in Boston.
- **Aastha Rajani**, UMass Amherst: I'm very happy to share that I'll be joining Jefferies as an Equity Research Associate starting July 2026.

# GOOD NEWS!

## A SPOT LIGHT ON ADVANCEMENT



### Good News from UWIN Alumni

- **Jazlyn Barnaby:** I completed the Associate Development Program at Loomis Sayles and am now an associate on the Strategic Marketing Team.
- **Gianna Capo:** I was recently promoted to Manager on the Commercial Banking & Capital Markets team at BCG! And on a more personal note, I got engaged in April to my (now) fiancé Charlie.
- **Angie Dulin:** I accepted an offer from MFS for an equity research associate role and will be starting at the beginning of February. I also graduated magna cum laude from Northeastern University in December 2025!
- **Carolina Ivet De Leon:** I started working as a Revenue Cycle Analyst at Versant Diagnostics, a pathology acquisition platform company in Texas!
- **Jackie Gilmartin:** I was promoted from Associate to Assistant Vice President within Bank of America's Global Commercial Bank on the Middle Market Metro New York team.
- **Amani Kayat, Michigan State University:** Once I graduate from Michigan State University in May 2026, I am happy to announce that I will be a part of Vanguard's Financial Advisor Development Program, where I will be able to take part in rotational roles to build skills in financial advising, obtain my necessary industry licenses and certifications, and transition into a full-time role as a high-net financial advisor once the program is completed.
- **Julia Kuang:** I'm starting my first job in DC this summer as a consultant at Bates White Economic Consulting!
- **Sahithi Macharla:** I've been promoted to Senior Investment Analyst at the Brandeis University Endowment.
- **Sarah Monsini:** I began working at Loomis Sayles in July 2025 in the Associate Development Program!
- **Ada Nystrom:** I graduated from the Isenberg School of Management at UMass during the fall of 2025 and accepted a role with the Associate Development Program at Loomis Sayles.
- **Nikan Parsaei:** I joined Boston Scientific as an Associate Analyst in September 2024 and was recently promoted to Pricing & Contracts Analyst II. I'm grateful for the foundation UWIN provided and the role it played in helping me start my career.
- **Nathalia Succar:** I am completing a year abroad at the London School of Economics and Political Science as a general course student. Additionally, I am a member of the LSE Political Risk and Investment Society, where I explore global finance through a geopolitical lens and engage with experts on global affairs—an experience that strongly complements my interest in asset management.

### Good News from the UWIN Team

- **Kristen Moldovan, CFA** passed level 3 of the CFA exam and assumed coverage of the integrated and independent energy space in investment grade.
- **Lauren Murray** completed the Associate Development Program and is now an investment associate on the Emerging Markets Fixed Income Team. She passed level 2 of the CFA exam.
- **Shannon O'Mara, CFA** was promoted to Head of Credit Research.

If you have good news to share, we'd love to hear it!  
Email us at [UWINinfo@loomissayles.com](mailto:UWINinfo@loomissayles.com)

# Apply Now for 2026-2027

In order to be considered for the UWIN program, you must provide an application, a resume, and a cover letter. Applications are available on the careers section of the Loomis Sayles website beginning February 1, 2026. **We strongly encourage all people who are committed to advancing the UWIN mission to apply, regardless of gender or gender identity.**

## RECRUITING DATES

**February 1, 2026:** Applications open on the Loomis Sayles careers website

**February 17, 2026:** UWIN Information Session  
<https://careersloomissayles.com>

**March 5, 2026:** Applications due

**March 16 - 27, 2026:** Candidate interviews

**April 2026:** Decisions communicated

### CONTACT US

[UWININFO@LOOMISSAYLES.COM](mailto:UWININFO@LOOMISSAYLES.COM)

### VISIT OUR WEBSITE

[WWW.LOOMISSAYLES.COM](http://WWW.LOOMISSAYLES.COM)



[eUWIN\\_loomissayles](https://www.instagram.com/eUWIN_loomissayles)



[www.loomissayles.com](http://www.loomissayles.com)  
One Financial Center, Boston, MA 20111

## UWIN LEADERSHIP

Shannon O'Mara, CFA, Head of Credit Research & Founder of UWIN and Program Leader

Andrea DiCenso, Portfolio Manager & Strategist – UWIN Advisor

Erika Fallon, Administrative Manager & Executive Assistant – UWIN Events Coordinator

Catherine Ferri, Senior Research Associate – UWIN Mentee Advisor

Michael Frederikse, CFA, Senior Investment Analyst – UWIN Mentor Advisor

Justine Gearin, Sustainability Analyst – UWIN Intern Advisor

Steve Hoppe, Senior Fixed Income Trader – UWIN Mentor Advisor

Tricia Keefe, Head of Corporate Services – UWIN Mentorship Program Coordinator

Kristy Keenan, Associate Investment Director – UWIN Internship Program Coordinator

Kristen Moldovan, CFA, Analyst – UWIN Internship Program Coordinator

Lauren Murray, Investment Associate – UWIN Intern Advisor

Marissa Neill, HR Business Partner – UWIN Marketing & Recruiting

Marianne Winkelman, Director of Global Bond, EM & FX Trading – UWIN Advisor

Eva Diep Mei, Senior Administrative Assistant – UWIN Admin

**INSPIRE.  
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